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ABSTRACT

This guidebook is intended to help conference program planners in their jobs. The book is organized in four sections. Section One introduces the book, establishes reasons for having a conference, suggests alternative program models, and describes the coordinator's roles. Section Two describes the process of conference planning. Chapter 1 of this section examines time, money, and budgets, and Chapter 2 discusses facilities, promotion, registration, special arrangements, and the planner's fee. In Section Three, onsite realities of the program and evaluation are discussed; the final section concerns the aftermath of the program--financial "clean up," final evaluation, and planning for next time. An appendix to the guide, which makes up about half of the booklet, contains checklists, idea sheets, a bibliography, and sheets for planning. (KC)

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Successful Conference Programming Methods

ED279836

Your Guide to Effective Planning and Administration

by Gus Mueller

ED264478

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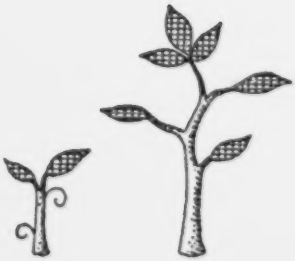
SECTION ONE

First Things First



INTRODUCTION

What This Book Is About

This book is about YOU. It is intended as a guidebook to help you become a more effective (and happier) conference program planner.

This book is a means to an end. If it helps you, I have accomplished my goal. Even if it just gives you a new idea or two --or a new way to view an old idea --then, I've won! That's my intention: to help you do a better, more self-fulfilling job.

So read on. I've whetted your appitite. At least you've secured this book -- and have opened the cover this far. NOW READ ON -- and enjoy. I've tried to make it interesting and fast-moving. But above all, USEFUL!

What I say in this book comes from my own experience. I've also gleaned some excellent ideas from friends. Hopefully, my experiences from planning and conducting hundreds of conference programs will help you. I want this book to be practical, down-to-earth, usable. You'll have to look to others for theory. I want to give you what I've found that WORKS! And I think I can do that, because the methods I've used have won awards.

CHAPTER 1

Who You Are

You are the KEY person! Conference program planners are at the center of the action. You provide guidance and direction for all the other members of the planning committee. You counsel the chairperson. You set the time frames for planning action. You enumerate the various ingredients required for the program's success. You delegate tasks for others to perform. You are the "grand marshal" of all the forces at work. You are the one in control of the multitude of minutia. YOU --you -- you. You are where the "buck" stops!

Because of these convergent forces upon you, you find excitement in what you do. Adult continuing education, in the form of conference programs, is an exciting arena in which to work. Those who can't take the stress soon leave it. But many "old dogs" keep at it because it's FUN.

BUT YOU ARE MISUNDERSTOOD.

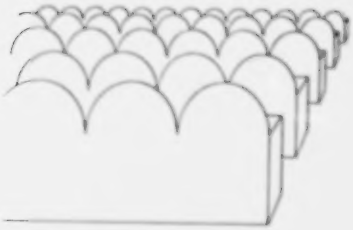
Many people have no idea of what you do! They rarely see you working at your most important functions. In fact, they see you most often when your work is almost done -- on-site at the program, facilitating. No wonder many people think conference coordinators are "go-fers." They see you "going for" the coffee, A-V equipment, etc. They don't realize you are just handling routine on-site chores to keep a masterfully planned conference program running!

So you must know yourself WHO YOU ARE! You need to have your own role expectations well in mind. You need to know what you do is vitally important. You are the hinge on which the successful program turns. If this sounds like "psyching" you up, it is! The other committee members are important. The chairperson has a role. BUT YOU ARE VITAL TO THE PROGRAM'S SUCCESS. Nobody else can perform your functions -- even though they may try.

Now that we've set straight who you are and how important you are, let's go to one of the big questions you need to ask at the very beginning: Why have a conference?

CHAPTER 2

Why Have A Conference?



People have "conferences" for a wide variety of reasons. Some are valid; --others, well??

The first recorded conference took place in the Garden of Eden, attended by a serpent and Eve. As Genesis 3:5 of the Scriptures tells us: the serpent advised "your eyes will be opened and you will be like God, knowing good and evil."

As a result of this conference, Eve ate the forbidden fruit -- and you know what a mess the world has been in ever since. However, the fact that the first conference speaker was a SNAKE, who gave bad advice, seems to have had no long-term damaging effect on the desire to hold conferences!

"CONFERENCE" is a generic term. The person asked to "plan one" encounters an interesting paradox:

> S/he is faced with the need to plan, conduct and evaluate something about which only a vague notion exists. Yet at the same time, the person without much experience may not be too upset because it is commonly believed that "anyone can plan a conference." (Just ask anyone who has attended one!)

Let me share with you a definition of this generic term "conference." Howard Y. McClusky of The University of Michigan, one of the nation's most noted adult educators, says it is "a planned and orderly series of educative experiences designed to achieve an educational objective."

Now, why do people plan such "educative experiences?" To learn new skills. To up-date presently held skills. To improve or increase knowledge. To share information. To make public the results of research. To meet constitutional requirements. To hold the "annual meeting." To spend money before the end of the fiscal year. To provide an arena for "social interaction."

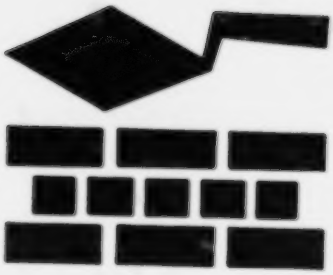
You see, there are lots of reasons. And who can say one is better or more important than another? In Chapter 3 I'll deal with some of this in more detail. But here I want to make clear that the reason your conference or meeting is to be held is a

vital FIRST CONSIDERATION. If you don't have a clear answer to WHY, you'd better stop and get a clear answer. Otherwise, it's a "bomb-out" you're about to plan!

There are lots of "ways" that conference programs can be developed, too. But all of this fits into the next chapter. So please read on!

CHAPTER 3

Foundation Blocks For Conference Design



Does the title above look a bit strange? -- like out of "kilter?" Most of us are accustomed to proportional design and arrangement. The "FOR" should have been centered -- to hold together properly the two important lines "FOUNDATION BLOCKS" and "CONFERENCE DESIGN."

Think of the important "balance" and "support structure" your designing technique will need as you plan and develop your conference programs. You don't put the roof on first. The foundation is where it starts -- and that's true every time.

As FOUNDATION BLOCKS for your conference plan, there are three areas you should keep in mind: (1) Assumptions; (2) Questions, and (3) Alternative models of programming.

ASSUMPTIONS

There are FOUR ASSUMPTIONS you must validate when you begin designing your conference:

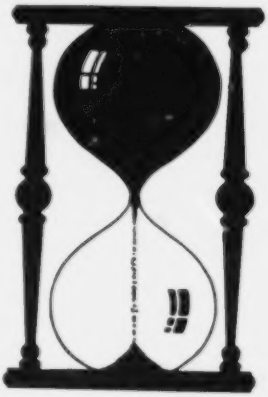
FIRST -- you assume you have a clear identification of the primary (and secondary) clientele to be served by the program. You know who it is for!

When I began to write this book, I asked myself "who will buy and read it?" "Conference coordinators," I answered. But who else? Obviously, I'm not going to sell this book to many conference coordinators in institutions of higher education. There really aren't that many in the land!

This is the first assumption to be validated -- that YOU know who your program is for. You have validated their interest and willingness to take part (and pay money to do so!). If this assumption is not validated, then do it now -- before you go any further!

SECOND -- you assume there is adequate time for good planning and development of the program. What's adequate? SIX MONTHS MINIMUM! -- better yet, eight months, or even a year.

Yes, I've done programs in three or four months. They're "quick and dirties." And they just about always show it! There are no short cuts in this business. REALLY! You get what you pay for. And here the payment is ADEQUATE TIME for a good program. If you don't want a good program, you can do lots of corner cutting. But a good program reflects adequate time and preparation for all aspects to be developed and carried out.



THIRD -- good planning assumes that you have carried out some form of needs assessment (of your validated clientele!), and have set goals and objectives for the program. Goals indicate what it is you want the program to accomplish. Objectives are measurable ways to determine if the goal has been met (...you will be able to...). Both goals and objectives are manditory if you propose to ask: "was the program a success?" Successful completion is the output, based on the input of goals and objectives. Without input, an output result (success) cannot be determined!

FOURTH -- good program planning assumes that you know how the program will be promoted or marketed to get the clientele to attend. What means of marketing will be used? Direct mail, structured for direct response? Media advertising? Informal invitational letter? Formal engraved invitations?

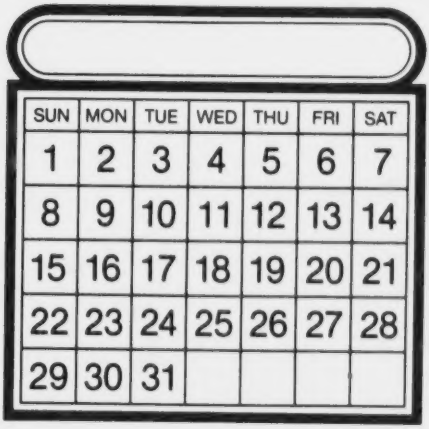
I do not propose to be a marketing expert. One thing I've learned over the years is to seek the advice of an expert who knows how to do it.

One such expert on promotion and program marketing is Helen Farlow, whose book is listed in my selected bibliography. Look it up and read it --and others!

QUESTIONS

Now, once we acknowledge and validate these four assumptions, we're ready to consider some of the basic QUESTIONS that potential clients will ask (and need to know) about the program as they anticipate attending.

Below are 10 Questions to consider -- basic information your clients will need to know about your program:



1. WHEN IS IT? What's the program date? How is this date related to other dates? --holidays? -- special events?

2. WHERE IS IT? -- in what city; on what street; in what building; on what floor; in which room? People don't want to waste time and energy wandering around trying to find out where they are supposed to be. Be specific about where your program takes place.

3. HOW DO THEY GET THERE? --by air, rail, bus, car, boat? It there easy limosine service? Where do they park a car? Can they walk from the meeting to their hotel?

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4. WHERE DO THEY SLEEP? (if overnight lodging is required or desired) --in a dormatory? Motel/hotel? How do they make a reservation? Will their reservations be confirmed directly from the lodging facility? What about a guarantee deposit? -- by when? Late arrival?

5. WHAT ABOUT MEALS? Most people like to eat. Are there planned conference meals? Will they eat on their own? Where? -- how far away? Can they walk there?

6. WHAT IS THE PROGRAM ABOUT? What is its purpose? Are the objectives clearly stated?

7. WHAT WILL THE PROGRAM DO FOR THEM? What benefit will the program have for an attendee's career? -- job? -- personal enrichment?

8. HOW MUCH IS THE PROGRAM FEE? What's included in the fee? How can the payment be handled? -- VISA/MasterCard? Registration by toll-free phone call?

9. WHAT ABOUT FUN? A new city to visit! -- Tours? How much time is available?("white space" in the program) Where's the night life?

10. WHAT FOLLOW-UP IS THERE? Will there be a proceedings, roster, papers, evaluation summary? Will participants have a chance to suggest program ideas for next time?

These 10 Questions are only the highlights. As you ponder them you can go deeper -- get inside them. Put yourself in the potential attendee's shoes. Forget that you know anything about the program, or arrangements. Mentally "walk" through it -- step by step. What questions do you have? -- obstacles encountered?

Answers to these questions become vital ingredients that help to design that "planned and orderly series of educative experiences" you have in mind. These answers are part of the foundation blocks of your good program structure!

ALTERNATIVE MODELS

Just as there are different goals and objectives, there are alternative models of programming to be considered when designing your conferences.

The literature of adult education offers much for your reading. You can find several books. But I want to fulfill my promise that THIS BOOK will give some practical guidelines and ideas. (I dislike books that tell you to look elsewhere. You're reading this book -- and it should at least give you some help here!)

Below are eleven alternative models in conference programming design. They are not original with me. But I have used almost all of them -- and find they work. Each has its own definition, physical arrangement, method and technique (although these are not mutually exclusive). Several may seem to have quite similar aspects. I only give you the high-lights here. The first seven are the most commonly used models:

1. CONFERENCE (same word, but used here with a more specific design and environment then the generic term)
   -- A gathering of people in large or small groups. Participants usually form a close-knit group who consult together in an informal fashion on problems of mutual concern.

2. INSTITUTE (or CLINIC)
   --A training meeting for individuals interested in a specific field; may be a series of sessions one day or several days.

3. SEMINAR
   --A group of persons engaged in specialized study led by a recognized authority in the subject.

4. SYMPOSIUM
   -- A series of short speeches given by two to five experts on as many aspects of a problem as there are speakers.

5. WORKSHOP

--A small group sharing a common concern or problem, meeting together to improve individual proficiencies, solve a problem, or extend their knowledge through extensive study, research, and/or practice.

6. COLLOQUY

--A modified **panel** of six to eight people, with half representing the audience, and half as resource persons or experts -- conducting an orderly **conversation** on an assigned topic, in full view of the audience.

7. SHORT COURSE

--A short period of intense instruction on a specific subject, but less concentrated and more simple (an overview) than a college credit course.

8. FORUM

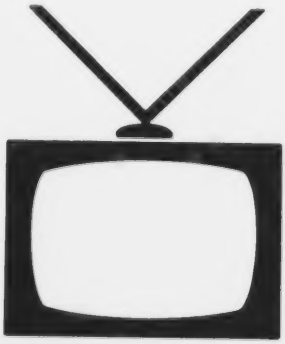
--A public assembly with everyone expressing views on a topic; audience participation in a large (town) meeting; helps gather opinions and test ideas "under fire." Success depends on ability of moderator and "maturity" of the people (heat vs. light).

9. CONVENTION

--An assembly of people from local (state) groups who are members of the parent organization; to decide policy; elect officers; plan strategy, promotion.

10. TELE-CONFERENCING

--Using electronic media to connect people in remote locations for instruction/information exchange; using VTR tapes or TV and audio hook-up. A variation is the telephone "conference call" with a group of up to eight persons.



11. COMPUTER CONFERENCING

--The use of interactive terminals (visual display or print-out) available to participants in various remote locations. Each location can access the data, manipulate, and give feedback.

This list of eleven alternative models is in no way comprehensive. You may want to search out others. But the basics are here as a guide for your consideration. Ironically, one model not listed is the **lecture** -- still extremely valid as a way of imparting information to a large group of persons in a short amount of time.

But now I have ventured from models into methods! -- or techniques. And as you may readily note, the lecture, as a **method**, can be used with a variety of programming models.

Here are some other methods/techniques that can be used:

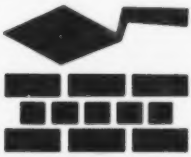
Audience reactors	Demonstration
Brain storming	Case study
Buzz sessions	Panel discussion
Committee	Skit/Role play
Discussion group	Field trip/tour

I read recently about a seminar planner who was "scared to death." She had planned two very successful programs, and was asked by her boss to organize a third.

She was scared because she "hated to mess with success." Although the first two went well, she was afraid the third might not. She said "They expect this one to be terrific because the other two were. That scares me, because I'm not sure I even know how I managed the first two."

The reason her first two seminars were successful is that she worked very hard to ensure they would be. She planned adequate time for speaker contact, promotion, facilities and equipment. She knew how to delegate authority, how to inspire people to want to do what was needed. She was a good manager, but didn't seem to know it!

There are no "deep secrets" to planning effective conference programs. What I have described in this chapter are the "building blocks" -- the foundation on which you can build a solid, meaningful educational program -- and know why you were successful. You can do it over and over again if you understand that PURPOSE (why), GOALS AND OBJECTIVES (what) and MODELS AND METHODS (how) are what you build on.



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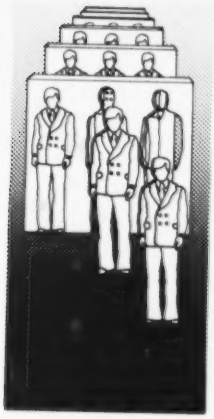
CHAPTER 4

The Coordinator's ROLES



You have plural roles as a conference planner. If you ever doubted it -- believe it!

The literature in the field of conference coordinating discusses the "educator -administrator - facilitator" aspects of what a conference coordinator does.

Personally, I like Kurt Lewin's approach the best. A person's ROLE EVOLVES FROM FUNCTION.

If you function like an educator -- that is, if your attitude and approach are set toward providing an educational experience, using the best planning tools available to you -- then your role IS that of an educator.

If you are really "administering" the program -- making sure that all bases are covered, no stone unturned, all details prepared -- then your administrative expertise will show.

If your "thing" is to make sure the rooms are ready, the coffee is on time (and hot), the A-V equipment is functional, etc. -- then your facilitating will be your trade-mark.

In reality, though, an effective conference planner is ALL OF THESE! Not all at once. But as the function is required, so the role is performed! (Lewin was right!)

The problem seems to be (as voiced by many coordinators) that "nobody appreciates" the educator fuctions performed. Some people want only the administrative functions. And when the majority of people see you at work, they see you "facilitating."

So where does that leave you? RIGHT WERE YOU THINK YOU ARE! In conference program planning, you ARE what you THINK YOU ARE! A strong self-image is the first ingredient of the successful programmer. Other people will regard you the way you let them!

In other words, if you want to be an "educator" in your work, THINK OF YOURSELF AS ONE. Likewise -- as an administrator; or a facilitator. All three are very worthwhile functions and roles. You can't escape functioning in all three roles from time to time. But your own self-image sets the tone! Believe it.

The reason I stress your role and image in this chapter is to get you "prepared" for what is coming -- lots of "nitty-gritty" ideas, hints, and advice. The nature of the work of a conference programmer is to "make it work." That's what this book is really about. But before you get submerged in "detail," I need to help you get your thinking straight about WHO YOU ARE.

That's why this first section emphasizes "First Things First!" I've been discussing YOU --and WHY conferences are held at all -- and FOUNDATION BLOCKS to help you get started right -- and your ROLES (plural), as you function in your vitally important work.

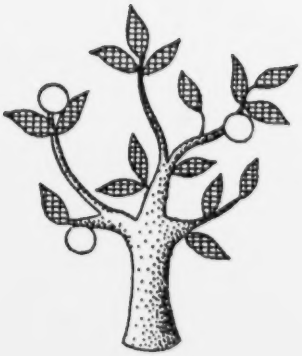
I am trying to "psych you up" because I believe the attitude you have toward yourself and your work contains the secret of your success.

In our over-specialized world, some people have lost sight of what it is they started out to do. Get the GOAL OUT FRONT! If you want to be the best educational conference programmer in this country, then BE!

Now -- on to the "nitty-gritty."

SECTION TWO

Getting Ready To Make It Work



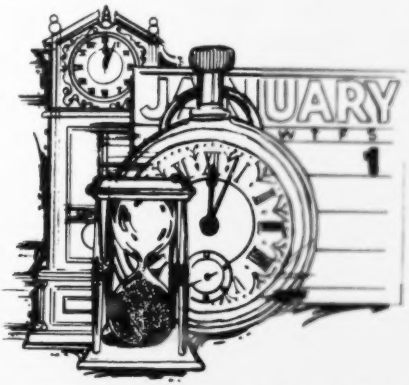
CHAPTER 1

Making Your Ideas Real

In this chapter I'm going to talk with you about practical matters -- time and money. These have to be REAL if you are to be successful in your program planning.

TIME

Time and its use is what divides the successful from the "less so." No one has more time in life than anyone else -- 24 hours/day; 168 hours/week; 8,736 hours/year. It's not the amount you have, but how you use it (and allow it to be used by others) that makes the difference.



Sucessful conference program planners conduct their lives by the CALENDAR and the CLOCK! Not in a slavish way, but by managing the time they use and allow others to use. They make time worth spending on what is taking place. And when they "fritter away" some time, they feel relaxed about it -- not guilty.

Time is a TOOL. In successful conference program planning, it is probably the most important tool you have. You can accomplish just about anything required --you can get together all the necessary ingredients of a successful program -- if you make available the time to accomplish the tasks!

How is time made available? By planning and management! But YOU have to do it. No one will plan and manage the necessary time (you need) for you!

In the appendix of this book is a TIME PLANNING CHART. It will give you a guide for working out your own chart. The chart reads from the BOTTOM UP --from the beginning day of the conference. Flip over to it right now (page 47) and take a quick look.

This is a realistic guide. I developed it for use in the planning of the National Adult Continuing Education Conference (AEA/NAPCAE) held in Detroit, Michigan. It has become the "center spread" in a Conference Chairperson's Planning Guide which we developed for use by our coordinators at The University of Michigan.

Notice, it calls for at least six to eight months time for planning -- from the initial meeting to the beginning day of the program. That is optimal. Sometimes a year or more may be needed (as the Detroit conference did!).

As you examine the Time Chart, look for the blocks of time and "flow" needed for your planning. Many items work backward from the mailing date of the promotional material. Roughly, 5-6 weeks are needed to get it ready; 5-6 weeks for the mail out and response with registration card and check. TIME becomes CRITICAL when you approach 3 months before the conference. Those last 90 days speed bye -- with so much yet to do. This is not a comprehensive checklist, but examine this Time Chart for what it is: a GUIDE for you to use so everything will be "ready to go" on opening day.

Some people don't believe me when I say this much time is required to do a professional job of program planning. "Why can't we do it in three to four months?" they ask.

There are some short cuts. If everything above the 3 month line (before opening day) has been accomplished already (by someone else), you may be able to pick up the reins and "go for broke." I encounter people who reject the idea that a good brochure (typeset and printed) takes five weeks from copy-in to mail-out. We can do a "quick and dirty" print job -- but you get what you pay for, in time (as well as money).

What I hope you are catching here is the reality of the importance of TIME in planning. Time is a tool of your success -- to make arrangements; to set the goals and objectives; to recruit the leadership; to develop the promotional mailings; to arrange for necessary support services; to manage and administer the registration process. All of these tasks can be accomplished in a professional, successful way IN TIME!

MONEY

By "money" I really mean BUDGET for the program. The budget is a GUIDE for the anticipated expenses and income of the program. Look again in the Appendix. There is a copy of an ESTIMATED BUDGET there (page 69).

Examine the expense categories first. That's where you need to start when you build your program budget. Plan what you want the program to be (facilities, speakers/leaders, food, other) and then quantify these program aspects in dollars to be spent.

Not all line items apply to every program. Again, use this as a guide to develop your own budget. But notice the internal structure: food items, travel, program expenses, then administrative expense (your costs).

There are several viewpoints on how a budget should be constructed. Fixed and variable expenses can be categorized. Administrative fees may be calculated in a variety of ways.

I think a full discussion of all the details of building a budget and computing an administrative fee could become a day-long seminar. But let me give you a sample of my thinking.

BUILDING REALISTIC BUDGETS

Budgets contain no magic! They are guides for the expenditure of money. They also help predict the "bottom line" balance -- as a surplus or loss.

Since they contan no magic, anyone can create a budget. You need only to know where to begin.

I suggest you begin at the BOTTOM. That's the point you want to know about. The question I am asked the most is "How much does it cost?" My reply is "How much do you want to spend?" Allied with this is "how much do you want to make out of the program?" -- for internal needs, support, or growth potential.

So begin your budget at the bottom: How much for you? Call it anything you like -- internal expenses, departmental support, etc. Include it as a line item in the EXPENSES of the budget.

Next, begin to estimate the other line items of expense: speakers stipends and travel; meeting facility costs; promotional costs for printing and mailing, etc. Look at the budget form and visualize the line items as your own. Only you know what the actual expenses will be, based on your program needs and local costs to provide them.

Fill in each line item of expense that applies. Add others that may not be mentioned. Then, when you have all the line items estimated, add them up (including your "internal expense" item) to get the TOTAL PROGRAM EXPENSES.

Now, you are ready to begin applying my "Six ways to calculate your administrative fee." I will give you a lot of detail and description on how to go about making these six calculations -- but that is in the next chapter. If you want to look ahead a few pages, you will find it beginning on page 25. For now, however, just assume a dollar figure for your fee.

Once you have decided on the administrative fee, then add it to the program to obtain the TOTAL EXPENSES.

$ $ $ $ $ $

Now, to establish a fee to be charged to registrants and thus establish your INCOME to support the program expenses, simply divide the total expenses by a conservative estimate of the anticipated "paid" attendance.

If you have other sources of income (e.g. funding grants, gifts, exhibits, etc.) they may be subtracted from the Total Expense figure before you divide the expense by anticipated paid attendance. In reality, such funding off-sets that amount of expense, so your registration fees do not need to raise that income.

If your funding is not "certified" and may only be a "draw" or cushion in case it is needed, then disregard it as income and do not subtract it from the expenses. Use it as it is -- as a reserve in case your paid attendance is smaller than estimated, and your resulting fee income is lower.

This "contingency" use may be made also of your "internal expense" line item. You have planned to recover it as a valid expense item. If you need to "trim" your budget, however, this may be a good place to shave a few dollars.

Finally, no budget works out to be exactly "zero" at the bottom. There will be either a surplus or a deficit. A surplus represents unanticipated "extra" money, to be used by the program sponsor. A deficit means the sponsor must absorb the loss, thereby reducing the "internal expense" line item, or pay it from some other fund set up to sponsor the program. Either way, however, there is flexibility built into the budget. And this is my whole point. Realistic budgets provide for good estimates of expense and income, but contain flexibility (rather than rigidity) to make it work! YOU CAN MAKE YOURS WORK FOR YOU THE SAME WAY!

CHAPTER 2

Advance Planning And Preparation

Pre-Program Preparation

Consider now some other very important matters: Facilities, Promotion, Registration, Special Arrangements, and Your Fee.

Facilities

The physical location in which to hold the conference needs very early consideration, even if program details are sketchy. Advance reservations become more critical every year. Space is in short supply -- especially during prime times. Many programs compete for the same rooms. Even having a conference center building may not make it easier to book space you need for the meetings and overnight lodging. Think ahead. Visit the site. Talk with the sales director or booking representative. Get the space reserved at the first possible opportunity --and get it reserved IN WRITING! Then, revise your needs and space requirements as the program details become final.

Be sure to play fair with your facility managers, though. They want to rent the maximum amount of space the maximum about of time. Realize this is their business. Keep unusual requests and "favors" to a bare minimum! Play square with them and they will respond in kind. Realize that these are resources (and the people who arrange them for you) that you need over and over again with several programs. "Bargaining" may get you a lower price or a choice room once -- but what about the next time?

Promotion

This aspect of your program requires your best thinking, and the expert touch of a good "promotion coordinator" or editor with a journalistic flair. Here, again, you may need to rely on an expert resource (like I did in helping with this book!). Don't try to do everything yourself! Trust others. They will help you.

There are some excellent books you can read that will help, too. Good promotion often means the difference between success and failure of the program, due to lack of response. Again, if you need help (and you probably do!), then GET IT.

Registration

When registration cards begin coming back in the mail, your "system" for processing should be well in place. There are several aspects to consider.

Who will extract the checks and make the bank deposit? Is there a separate account number for each program, to keep the accounting straight?

The person who handles the first function (whether in a business office or wherever) should prepare a tally of the categories of FEES received, and the money deposited. This person should be separate and have nothing to do with the later tally of registrations.

A second person (conference secretary) should receive the registration cards and financial tally. This person then posts the various categories of REGISTRATIONS received. Following this posting, a file box should be set up to contain the alphabetically arranged registration cards, name badges, tickets, etc. for each person. A clear plastic "sleeve" envelope facilitates keeping these items together, yet visible -- with the name badge card up front. (This will help at the on-site registration desk).

The registration process should include preparation of an acknowledgement form for mailing to each registrant as cards and checks come in. Other items can accompany this form in the envelope, such as a map, parking permit, etc. One innovation is to mail also the name badge card and other tickets (meals, football, etc.). This enables people to avoid standing in line on-site to pick up these items if they are Pre-Registered. We've tried it. People like it. IT WORKS!

You can devise your own registration process and system. My suggestions are, again, a guide. But here are two considerations to keep in mind: (1) make it easy for the person who is coming to the program; and (2) keep accurate records!

Special Arrangements

The speakers/leaders coming to make presentations in the program need to recieve from you details about several matters. Have a "special arrangements" letter sent to them. In it, specify the situation of each individual. Inform each speaker of the information that fits his/her situation: complementary registration is to be given; stipend is to be paid (confirm the amount). Remember, these people are your invited guests and presenters. Share with them all the details you can. Send an audio-visual request form so they can tell you what kind of equipment they need to have provided during the session. You can ask also for their social security number (to process stipend payments), and a vita to use for introductory purposes.

Speakers find it very helpful to have information about the registrants -- a demographic profile. This helps fit the presentation to the group.

Your Fee

As I promised earlier, I want to share with you various approaches you can use in calculating your fee -- the "administrative charge" or whatever you may call it. Almost everyone these days must charge some form of fee or "cost recovery" for their services. I have struggled with this as the department I direct has become financially self-supporting.

Here are my "Six ways to calculate your fee:"

1. Percentage Charge

This has been a well accepted approach. A charge of "X" percent of the expenses of the program. This makes the charge "proportionate" to the size of the program, the theory being that dollars spent on a program reflect the amount of time and energy spent in putting the program together and, thus, generating such expenditures. In other words, "dollars spent during a program reflect the time and energy spent in developing and administering the program."

This approach to your fee is easy to calculate. Add up the total program expenses; multiply by your "X" percent, and -- zip -- you've got your fee.

A growing problem seems to be that the percentage must be pretty high to really give you an "equitable" recovery of your costs. My experience is that 20 percent doesn't come close; not even covering half of "self-support" costs.

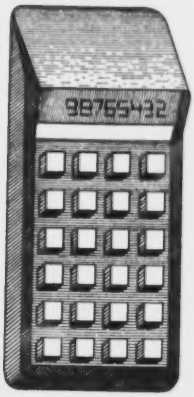
2. Time Charge

A "charge for services rendered," calculated on the time spent by various persons (coordinator, secretary, financial clerk, editor, bookkeeper, etc.) is a second method of fee setting or cost recovery.

This method requires a time log by each person, noting time spent (and perhaps categorized by function) on each program. A dollar "cost per hour" can be established, including salary and overhead, and charged accordingly.

Estimating how much time will be spent by various personnel is difficult at first. But after collecting data over a period of time, such estimates may be calculated for budget purposes. For example, data from a large program we have

administered with a time charge indicate that the coordinator spends 10 minutes per registrant; the conference secretary spends 22 minutes per registrant, etc. Such data can be converted into an estimated fee, based on time spent per registrant projected. The actual fee for the program, listed in the financial statement at the conclusion, will be calculated on actual hours spent according to each staff person's time log.



3. Per-Registrant Charge

The above leads to a third possible fee calculation -- a per-registrant charge.

You need past records for this. Take the number of registrants (paid and complimentary) from the past several years. Divide the total number of registrants (in all programs) by the annual cost recovery necessary (your annual budget). This determines the per-registrant cost TO YOU. Remember, this has nothing to do with program exenses! This is calculating how much YOU have to make from each registrant. Other expenses for the program get added on.

a. Total registrants per year: 16,000

b. Total budget needs (to be recovered): $220,000.

c. Fee per-registrant: (divide b by a: $\frac{\$220,000}{16,000}$) = $13.75

Such an example gives you the average cost per-registrant. Because not all programs have the same number of registrants and program costs, your fee may need to be "modified" by the size of the program attendance. A small program with 50 people may find the average charge too "heavy." A program with 1000 registrants may find such a charge "excessive." Your own situation and policy regarding your service and fee will need to determine its correctness.

A recent survey by Ball State University, Muncie, Indiana, found that the majority of the respondent institutions have a per-registrant fee. Whether the fee charged covers total costs was not indicated. It does show that several programming agencies and conference departments are using such a fee.

4. Program-Day Charge

A fourth approach you may want to consider is a charge "per program day." By "program day" I mean the number of days you actively hold programs. For example, a three day conference is counted as three program days. Each conference is counted. If you have three different programs on the same day, that's counted as three, not one, for that day.

Again, you need past records. Take all the programs held last year (and as many years back as you care to go.) Determine, by adding them up, how many "program days" you had each year. Just count the number of days reflected by each program. A one day conference is 1. A three day conference is 3. A two week program is counted as the number of program days involved. If week-ends were "off" you can exercise your own judgment. Add them all up for the year.

Last year we had 280 program days reflected in our programs. That was a pretty good year when you consider all the non-program days, like holidays, when no programs were held. Using this number of 280, a program day fee is calculated as follows:

a. Number of program days: 280

b. Total budget needs (to be recovered): $220,000.

c. Fee per program day (divide b by a: $\frac{\$220,000}{280}$) = $785.

Again, this is an **average** that may need to be "modified" by the individual program. But it is another approach to setting the fee for your services.

5. Cost Average Charge

A very simple fifth way to calculate your administrative fee is to calculate the average cost per program. By this I mean the amount of dollars you need to raise (or recover) is divided by the number of programs to be held in the year. For example, if your budget or cost recovery amount is $220,000 and you have 110 programs that will be conducted during the year, the average cost per program equals $2,000.

Again, this is an average charge and must be applied according to its appropriateness to a specific program. But it does provide a simple calculation and way to raise the dollars you need to cover your costs.

6. Registrant-Day Charge

A sixth and final way to calculate your administrative fee is to base it on the number of registrant-days a program has. This calculation has the advantage of making your fee proportionate to the size and length of the program, reflecting the effort and time involvement of your staff (without a time log!).

A registrant-day charge is determined by multiplying the number of days of the program by the number of registrants attending. Once this number is determined, it is then multiplied by a cost "factor" which you can determine to meet your needs. It can be an average (from the Per-Registrant Charge), or a dollar figure determined by comparison with others. In a survey of ten self-supporting conference departments which I conducted earlier this year (1981), the "going rate" ranged from $5.00 to $7.50 per registrant day. A 3 day program with 100 registrants produces a fee of $2250. (3x100 x $7.50 = $2250.)

This method of fee calculation seems to be the most common at the present time and has advantages of proportionality over others.

Summary

Setting your fee is not easy, regardless of the approach(s) you use. If you work with a sponsored program, the sponsoring agency may always think your fee is too high. Since most people do not know what all is involved in program planning and administration, (even though they **think** they do!)....it's a constant challenge to set a fee for services that is realistic to your costs, and "fair" to the sponsor and participants.

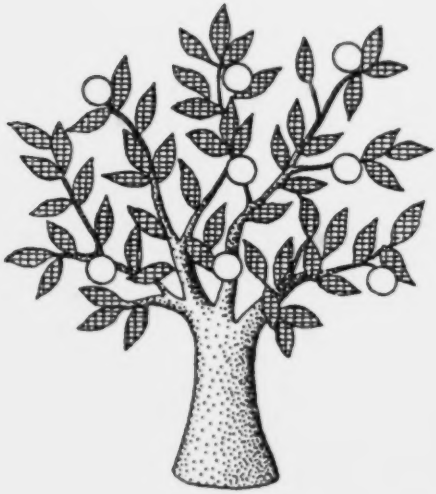
Your "pricing strategy" must be your guide. If you are able to give a lot of service, then your fee can reflect that. If you have no other resource for your support, then charge what you MUST! I've always liked the Bekins Moving Company slogan regarding its service: "We'd rather turn you down than let you down." That has implications for fee setting. If I don't recover what I need to support my service, I won't be around to "give" any kind of service!

I believe we have been too open with our fee structures. When I buy an automobile, the dealer doesn't fall all over himself trying to explain his "mark-up." I get a price. I negotiate, but in the end I PAY if I want the car. Why not QUALITY CONFERENCE PROGRAMS the same way?

I hope the above comments on these six ways to set your fee will give you new ideas to pursue. Be innovative. "Mix and match." Use them all in some ratio or relationship. Have fun with it -- it's your BREAD AND BUTTER! Enjoy the challenge.

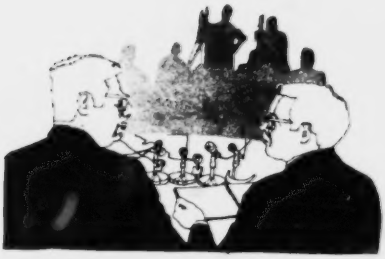
SECTION THREE

Opening Day



CHAPTER 1

On Site Realities



On-Site Set Up

Get there EARLY! If you are late in arriving at the conference site, you haven't got a chance to be sure all is ready for the program and participants. Here's where you earn your pay! And here's where you impress most people with your attitude, effectiveness, and general ability. This is your PUBLIC EXPOSURE. Don't "blow it" by being late. If it's out of town, get there the night before!

Of course, you should be familiar with the site. YOU SHOULD HAVE VISITED the site of the program even before it was chosen for the program. I mentioned that back in Chapter 2 of Section Two, remember?

OK. So you've arrived in good time at the site of the program on OPENING DAY. First question: How is everything set up?

Now, YOU CAN'T ASSUME! Have all the details you discussed with the building agent been carried out? Check them out! Look in each room. Is it arranged properly? Is the required equipment there? What has been forgotten?

What about the Registration Desk? Is it where it should be? Will people coming to the program be able to find it? Are directional signs in place? Are the required number of tables and chairs there for your staff? Are materials and equipment in place? Are your staff members who will handle on-site registration ready? Do they know their duties? Have you explained the program to them? When will they want to take their "breaks?" DO THEY HAVE A CASH CHANGE FUND?--with proper coins and bills? Do you have proper signs in place--with an alphabetical breakdown? How will people line up correctly? DO THEY NEED TO LINE UP? What about non-registered people? Do you have a "new registration" station--with cashier and typist?
Here are some tips from my own experience:

All these questions--and MORE--need to be answered quickly and correctly BEFORE THE REGISTRANTS ARRIVE! Once the crowd comes it's too late to make adjustments.

And what about your speakers and leaders? Are arrangements complete for them? Is someone greeting them and "shepherding" them? Have they picked up

their name badges, travel expense report forms, and other materials? How do they get their slides to the projectionist? Do they have questions--about their roles, their rooms, etc? A pre-conference speakers' dinner (the night before) often helps answer questions and "orient" the leaders. It also insures their presence at the conference! What will happen if one of your speakers fails to show up?

During The Program

So now the program is "off and running." You can relax, right? WRONG! Now you can think about **what comes next.**

Is there a coffee break? A planned luncheon? Does the quarantee need adjustment because of an influx of new registrants? Can you increase the number on such short notice? Where else can the "late-comers" eat? (DON'T try to have sandwiches brought in to sell on-site to the crowd. THAT doesn't work!)

What happens in the afternoon program? Are "shifts" of rooms, equipment, signs, or displays needed? Who does the "shifting?"

Your role during the program is to THINK! That's what "facilitating" the program is all about. THINK THROUGH THE PROGRAM, step by step, event by event. The program management is in your hands. Its steady flow is up to you! You are expected to be IN CONTROL. Exercise it!
Here are some tips from my own experience:

1. Don't try to be "Supercoordinator." You can't do everything yourself! Enlist a cadre of "phantom" helpers who, under your direction, know what is required--and see to it that it happens. Let these "phantoms" check the set up, audio-visual equipment, etc--while you stay at "control central" (the registration desk area). If it would help, wear a "beeper" so the phantoms can call you. Or better, have a telephone restricted for **your** use. Your helpers can call you, reporting on-site needs. You can call your resource suppliers (set-up people; A-V technician) and get the trouble handled.

2. By staying at "control central" the people who need you can find you. You are handy to answer policy questions regarding fees, registration items, etc. You are by the telephone if your caterer needs to check with you.

3. Have a pre-established good relationship with your facility manager. And DO NOT DEMAND! **Courtesy** gets you what you need. People will help if you **ask** for it. Resist the pressure to storm about and criticize anyone for mistakes. SOLVING THE PROBLEM, not placing the blame, is what's needed! Later, in the cool of another dawn, you can analize why something went haywire. You know--it may have been YOUR fault!

4. Enjoy the program! That's right, sit in and enjoy what is taking place. One of the wonderful realities of being a program planner and coordinator is to "taste the pie" after you have baked it. Here's your chance to learn a little about a lot of things. You can become a "half-hour expert" on a lot of topics. You can pick up the jargon. It makes great cocktail party conversation later!

Another reality of this work is the wide variety of contacts you can make. Take the time to get acquainted with the speakers and leaders of the program. They are experts in the field. Cultivate their acquaintance and friendship. Who knows where it may lead? The diversity is exciting!

CHAPTER 2

"How's It Going?"

Evaluation

While the program is happening, ask over and over: "How's it going?" Is everything working out as planned? What is being accomplished? How do you know it is a successful program?

Evaluation of a program begins before the program starts. Sounds odd, but it's true. Evaluation means measuring the outcome. But if you don't know what is supposed to happen, how can you measure it--or recognize if it happened?

Evaluation of a program needs two phases: during and after. During the program, you want to know if your speakers and leaders are hitting the mark. Are the goals being met? According to Quentin H. Gessner, there are three goal "systems" at work in a conference program: the Planners', the Registrants', and the Presenters'. Each have separate goals. If they are not at least complementary, the program will fail!

During the program, ask the attendees "how's it going?" Do it with an evaluation form for each session. Do it informally at the coffee breaks and group meals. Talk with as many people as you can--and LISTEN! Ask people why they have come--what they expect to get out of the program--how they feel about it so far?

If you find the program is "limping," some adjustments can be made. In a multiple day program, a speakers' breakfast can be called the morning of the second day--to discuss needed adjustments or changes in the program emphasis. Your leaders will welcome this input. The last thing they want to do is face a "hostile" or "bored" group. Tip them off. They can make changes that may very well salvage the program.

CHAPTER 3
"How Did It Go?"

More Evaluation

So often when a program ends, we go back to the office and, in a "euphoric" tone, tell the staff: "It's over!" Then we turn our attention to the next program.

What a mistake! It's not over. Only the program time schedule has come to an end. But now some of your **real** work begins.

"How did it go?" That question should really "bug" you, until you are able to give it an honest answer. And evaluation is your tool to gain the answer.

Have you planned a "PMR" (Post Meeting Reaction) sheet? Was it distributed--and collected--at the conclusion of the conference program? I mentioned earlier having a session by session evaluation form. Have they been regularly collected, and tallied?

Again, evaluation is the "measure of success" of your goals. If you began well in your planning, and knew what the program was supposed to do, it should not be too difficult to know how it came out. If your goals were fuzzy you may never know.

But all is not lost, even with fuzzy goals.

Often, a PMR gives you a "happiness" report by the attendees, instead of a real evaluation of effectiveness. Sometimes, six months to a year is necessary to measure the effectiveness of changes taking place as the result of a program. An evaluation form to gather data about such changes might well be mailed later to your participants. And don't forget your speakers and other leaders. Ask them for their evaluation of the program.

Dr. Betty Giuliani of Michigan State University is one of the best program evaluation experts I know. She has developed a very fine process of involving both presenters and attendees in the important work of evaluation. You may want to contact her for more details.

Another expert who presents a refreshing "different" approach to program evaluation is Dr. Adrian P. VanMondfrans of Brigham Young University. His ap-

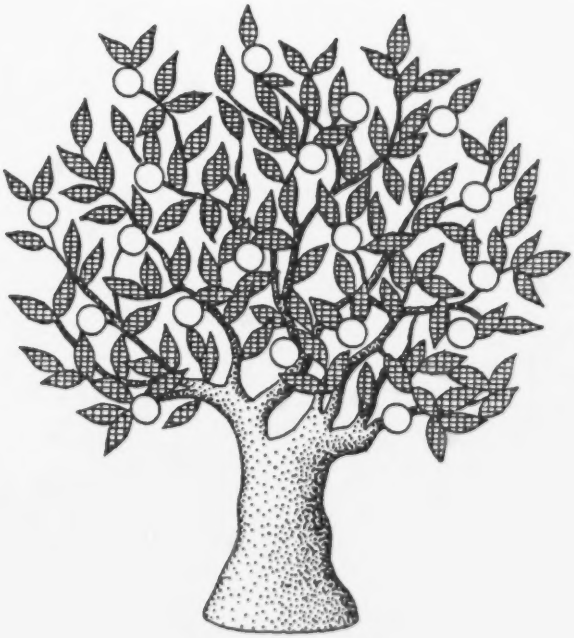
proach is from the viewpoint of whether a program is Entertainment, Enrichment, or Enabling to the participant. You may want to check his approach also.

What I'm trying to get across to you is the **importance** of evaluating the program. You need to know "how it went." But you can't judge it by whether the coffee was hot...or on time!

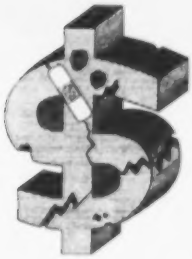
Before you hold the program, know how you are going to evaluate it after it's over. And know what you are looking for in the "measure of success." It's worth the effort!

SECTION FOUR

It's Over!



CHAPTER 1
Financial Clean-Up



Depending on your fiscal accounting system, it may take ninety days or longer to get the financial records of a conference program "tied up" in a statement of income and expenses. There are lots of details requiring your attention.

Refunds and billings need to be processed. Both of these are based on your policies, and what you told people they could do. A refund policy statement should have been part of your promotional brochure or letter--specifying a cancellation date and other particulars of fee refund. There may be a processing fee witheld. If meals were part of a "package fee," the individual may not be refunded a meal cost if s/he failed to attend. There may be no refunds allowed at all! Again, **your policies** are the rules to follow.

Billings are invoices you need to send out to collect the fees you have coming--if you allowed such a "billing" option. You may allow only agencies, units of government, or employers to be billed--rather than individuals. We find that's a good idea. Individual billings are hard to collect! An alternative for the individual is to allow the use of VISA or MasterCard charge of the fee. Then you have your money--and the bank has to fight the "non-payer" for the money.

"NSF" (non-sufficient funds) checks are another matter. Fortunately, we don't get many--but some! You can call the individual (phone number should be on the registration card!). You can send an invoice. You can hope! You may get to the point where your accounting department wants to turn it over to a collection agency (you get ½ at most). You may have to make some "public relations" decisions...to collect and alienate or let it go and absorb the loss. There are some tough situations you have to decide!

But finally, you've worked through the refunds and billings and "cleansed" your attendance record. Before filing the cards away in the archives, make a roster of all the attendees. Type it in matrix format, 30 to the sheet. This roster can be used to run off photo copy address labels. These people are the best potential customers for a similar program "next time." More on that later.

In the meantime, all the bills are getting paid. You hope! Somehow a speaker "charged" his room at the hotel, instead of paying the bill and getting a reimbursement--like you told him he should. And in the hotel charge are some

"extra" expenses you did not authorize. In fact, there is no Purchase Order authorizing any charge. Poor hotel! Either they have to write to the person--or you do, to straighten out the matter,

Then there's the speaker who came to your program from a previous one--and left for a third one afterward. S/He sent back a **photo copy** of the air fare ticket and rental car receipt--instead of the **originals.** Is s/he "double dipping?" Can you process photo copy documentation for a reimbursement? Or do you need a letter explaining why s/he didn't send the original receipts?

Your catered meal invoices come in for payment--in **your name** instead of the conference program. Oh, why didn't they send it to the address on the Purchase Order? Also, it's wrong! They didn't add tax--or they did add tax when they shouldn't have. Oh, boy! More phone calls--letters--hours spent trying to get it straight. No wonder it takes three months. But yesterday, the program chairperson called to find out "if we came out in the black ink?" You mumbled something about "ballpark estimates" and "I'll get back to you."

Finally, the bookkeeper does a "trial" (pencil) financial statement...and sends it for your approval. You breathe a sigh of relief.

WARNING. Don't approve it quickly. LOOK IT OVER! Compare it with your estimated budget for the program.

What came out as you had estimated? What were your "over-runs?" Where did you save "a buck or two?"

THINK BACK OVER THE PROGRAM! It's tough to remember now what happened three months ago...but DO IT.

Does the financial statement, compared with your estimated budget, seem to reflect reality? Does it include the on-site changes? What about the additional A-V equipment you had to order at the last minute? Or, how about the photo copies of that last speaker's hand-out? Were extra meals added because of on-site registrants? What other charges **should** be there that aren't?

Once you approve the financial statement--and the final disbursement of funds is made according to your sponsorship agreement, that's it! Be cool. Lay it aside. Examine it again and reflect on each item. Have all the billings been paid?--or have you been credited with income not actually received?

You can't expect the bookkeeper to know all about the program. S/He wasn't there. YOU WERE! Your approval COUNTS!

CHAPTER 2

"Was It A Success?"

Final Evaluation

Yes--one more time! Evaluate what happened. Make it a real "de-briefing."

Call your planning committee together for this. Make it a luncheon meeting. (Be sure to hold it before the financial statement is finished--so this bill can be included!)

Re-live the program! Step by step--event by event. Re-think the whole planning process--the goals and objectives established--the program format--the selection of leaders--the promotional time schedule and materials--the whole administrative/management process (facilities, registration, fees, meals, special events)...the evaluation process, and results.

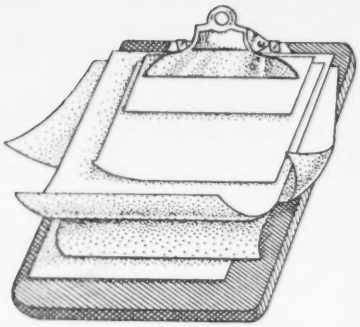
This is a tough process. Time has gone bye. People are busy with other tasks. It's hard to get them all together again. It's hard to remember!

But if you don't do this, you may never know if you were successful--OR WHY (assuming you were!).

Remember the program planner I mentioned earlier--who had two successes, but was afraid to try a third program? **She didn't know why** she was successful. So she was afraid she couldn't repeat what she had done so well before!

Successful (truly successful) programmers KNOW WHY! And they know why some things have gone wrong. Reflecting--second thoughts--"de-briefing" the program is a MUST. Unless you plan to change careers tomorrow.

CHAPTER 3
Planning for Next Time



So now it's really over...and you've had some "breathing" time. What about "NEXT TIME?"

Start planning right now!

Remember the roster of attendees you had typed in matrix format? (If you have a computerized system, hooray!) That roster is the foundation of your promotional mailing list for next time. Those people came! They are better than all the rest on the mailing lists you used, who didn't come. Sure, some of those may come next time because other things conflicted this time. But research indicates that **one-third** of your attendees this time **will come back** next time. If you had 300 attend, that's 100 attendees practically assured for next time. Check that against the budget "break-even" point.

Keep an active program file. All the notes from the evaluation meetings, and their summaries and tallys, should be easy to get at. Don't bury your records. You will want to look through the program file as you think about next time. Names and addresses are there. Resources are noted. Financial information can help you make projections for next time.

Consider how "next time's" program can be improved. How can it build on the recently concluded program's experience? Can you develop a series? Is there a core of information to be expanded? Is there a possible cycle that could be repeated over three or four months--or years--for the same participants, ending in a Certificate? Would offering "C.E.U.'s" (Continuing Education Units, a nationally recognized unit of recording non-credit learning experiences) help?

Make it your resolve: THERE WILL BE A NEXT TIME!

Work toward it. Start the planning now, and build on the past experience. Before it slips away, set up a time planning chart. Put tentative "holds" on facilities. Keep the planning committee active--even if "dormant" over some months.

Conference programming is a dynamic, LIVE experience. Remember how "sweet" the taste of success was? It can be again! Sure, some programs happen

only now and then. Some are "one shot" deals--perhaps being hosted at the other end of the country next year. The variety defies definition.

But you need to develop a mind set: NEXT TIME! Perhaps you will have the pleasure of being called upon to help...as a consultant. Maybe your program established a new "high water mark" experience for a national organization. And they want you to help them further by developing a "guide" for future program coordinators and planning committees--wherever they may be.

It can happen to you. I know. It HAPPENED TO ME--and the experience was JOYOUS!

There's always a NEXT TIME. Make it even BETTER.

That's why I've written this guidebook. To share my experiences...AND THE FUN I'VE HAD.

Now...YOU HAVE FUN, TOO!

Gus Mueller

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APPENDIX

NOTES ON THE CHECK LISTS AND IDEA SHEETS

The following notes are intended to make the check lists and idea sheets more understandable -- and usable. The note paragraph corresponds with the item on the facing page.

1. The "CONFERENCE AGREEMENT" form is intended to set forth in simple style the "what, why, when, where, and who" of the program. This sample form gives several options as to the program sponsorship --meaning who is putting it on. There are spaces for listing individual services to be provided. This may help to indentify "who is doing what." The financial information on the form comes from the Estimated Budget (appendix item 10). The financial agreement space permits a complete statement as to financial responsibility -- who will pay any deficit, or receive any generated surplus. Your fee may also be included in this space! The signature lines are for those who accept the program and financial responsibilities.

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Account Number

CONFERENCE AGREEMENT

TITLE:

PURPOSE:

Date of Program: Place:

Individuals and groups served:

Service Unit Administering Program: Code

sponsoring ____, co-sponsoring ____, or cooperating ____ (please check)

Name of sponsoring ____, co-sponsoring ____, or cooperating ____ organization(s) (please check):

persons with other organization(s):

Services provided by individual organizations:

Budget estimate based on paid attendance of _____

Estimated Total Program Costs $_____ Estimated Income $_____
Estimated Administrative Expense $_____
Estimated Total Expense $_____ Estimated Surplus (Deficit) $_____

Financial Agreement:

Representative Date

Signature of Organization Representative Date

Title of Organization Representative

account name and number, if applicable

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2. The "PROGRAM PLANNING TIME CHART" is a planning guide to make sure everything gets "done on time." Begin at the bottom with the opening day of your program. Work up the sheet -- backwards in time --to establish the necessary calendar dates when vital functions or items of information must be completed and "in hand." Without such a time planning guide, with meaningful deadlines, you're "flying blind!" This guide easily shows why 90 days isn't enough, if you want a QUALITY program.

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PROGRAM PLANNING TIME CHART

Item/Responsibility To Be Completed (due=date due in C&I Office)	Optimal Time Allowance	Dates month	day	done
Initial meeting & agreement with C&I Department	6-8 months before conference	___	___	___
Formulate Program Goals				
Develop tentative list of program leaders				
Develop publicity approach with coordinator & promotion coordinator				
Initial contact with & confirmation of program leaders	5-6 months before first mailing	___	___	___
Mailing lists/labels due	2 months before first mailing	___	___	___
Prepare final copy for initial announcement	2 weeks before due date	___	___	___
Typed copy for initial announcement due	5-6 weeks before mailing	___	___	___
Cover art/Artist for promotional materials	2 months before first use	___	___	___
Prepare final copy of program brochure information	2 weeks before due date	___	___	___
Final confirmation of all program leaders	3 months before conference	___	___	___
Typed copy for program schedule due	6 weeks before mailing	___	___	___
Typed Special Arrangments List due	6 weeks before mailing	___	___	___
Mailing date of initial announcement	8-10 weeks before conference	___	___	___
Mailing date of program brochure	4-5 weeks before conference	___	___	___
Materials (already printed) for conference folder due	2 weeks before conference	___	___	___
	OPENING DAY OF CONFERENCE	___	___	___

3. The "FACILITY AND EQUIPMENT REQUEST FORM" (two pages) enables you to give your secretary a complete list of all the facilities and equipment needed for a program. The secretary can use this as documentation for reservations and orders. It tells what is needed, when, where, etc. Once the facilities and equipment items are reserved (by phone), a written confirmation can be sent as a follow-up. This "source sheet" can be referred to later to be sure everything has been ordered. It serves as the basis for additions or cancellations, if necessary.

52

FACILITY AND EQUIPMENT REQUEST FORM

Secretary:

Coordinator:

Account Number:

Program Name & Date:

[ ] Reserve and confirm
[ ] Reserve tentatively
[ ] Check availability
[ ] Confirm only
[ ] Requisition
[ ] Cancel

ROOMS:

Facility	Room	Date	Time

FOOD SERVICE:

Type	Facility/Room	Date	Time	Number	Price

LODGING:

Facility	Arriving	Departing	#S	#D/T

Reservations handled by _____ Cut-off date _____

53

PROPERTIES & EQUIPMENT:

Description	Facility/Room	Date	Time

OFF-CAMPUS/ OUT-OF-TOWN FACILITIES

Name and address of person to receive confirmation:

_____

_____

_____

_____

_____

_____

Copies to: _____

_____

_____

_____

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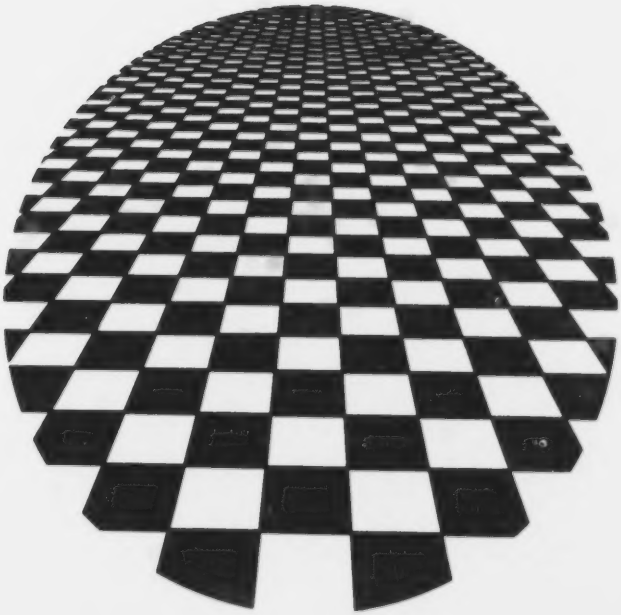

55

4. The "PROGRAM FILE CHECK LIST" (two pages) is a place for all "basic" information regarding the program. When filled in, it tells you at a glance that the support facilities and services for the program are "in order." It provides a "memory trigger" for the "little things" you need to write down "somewhere." There's a place for special notes (to yourself or secretary) to help you. More pages can be added if needed!

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CONFERENCE _____ DATE _____

COORDINATOR _____ ASS'T _____

CHAIR _____ EST. ATT. _____

Address _____ REG. FEE(S) _____

Phone _____ _____

FACILITIES

BUILDING	ROOM	DATE	TIME

MEALS	ROOM	DATE	TIME	NO.	$
					$
					$
					$
					$
					$

REFRESHMENTS	ROOM	DATE	TIME	NO.

LODGING	NIGHTS	NO.

TRANSPORTATION

DATE	TYPE	# PASS.	FROM	TO	TIME

MAILING LISTS NO.

TOTAL

REGISTRATION FEE(S) & MEAL PRICE(S):

$

FOLDERS

HEAD TABLE

SIGNS

Standards

Special

REQUISITIONS

BADGE

IMPRINT:

SPEC. ARR. LIST

EXHIBITS

A.V. FORMS

SPECIAL NOTES

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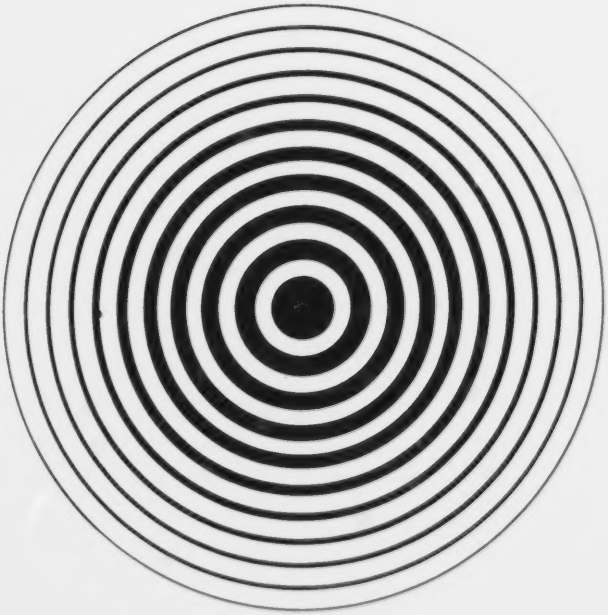

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5. The "PRINTED MATERIALS CHECKLIST" is a guide for your promotion coordinator or editor -- the person who gets your materials into print. It has lots of categories of information. It helps you communicate clearly what is needed in printed materials -- and in what form.

60

CONFERENCE _____

DATE(S) _____ ACC'T NUMBER _____

PRINTED MATERIALS CHECKLIST

	PIECE #1	PIECE #2	PIECE #3	PIECE #4
Descrip.	_____	_____	_____	_____
Copy DUE	_____	_____	_____	_____
QUANTITIES				
Mailings	_____	_____	_____	_____
Files/Dist	_____	_____	_____	_____
Chairperson	_____	_____	_____	_____
Conference	_____	_____	_____	_____
Misc.	_____	_____	_____	_____
TOTAL	_____	_____	_____	_____
DIST. DATE	_____	_____	_____	_____

GENERAL STANDARD MATERIALS

	Reg. Card	Ack. Form	Housing	Evaluations
	[] attached** [] separate [] special	[] standard [] special	[] attached [] separate [] self-mail	[] 8.5 x 11 [] card size [] other _____
Copy DUE	_____	_____	_____	_____
Quantity	_____	_____	_____	_____
Dist. Date	_____	_____	_____	_____

SPECIAL ORDER MATERIALS

	Name Badges	Imprinted Folders*	Certificates	Envelopes
Copy AVAIL	_____	_____	_____	_____
Quantity	_____	_____	_____	_____
Date NEEDED	_____	_____	_____	_____

*allow 6 wks minimum for processing

HANDOUTS	Copy DUE	Quantity	Dist. Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

MISCELLANEOUS

Meal Tickets # meals _____

tickets/meal: 1) _____

2) _____ 3) _____ 4) _____

** If reg. card is attached, indicate here only quantity needed for office/ on-site use or other special need.

Acknowledgment mailing to include:

[] cc map [] nc map [] special map

[] name badge [] meal tickets

[] parking permit

[] other _____

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6. The "MAILING CHECKLIST" is the companion to the "Printed Materials Checklist." The mailing process, in all of its precise detail, is noted here. This is a place to put notes regarding foreign/overseas mailing, and other "unusual" information. Make up your own to fit YOUR situation!

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MAILING CHECKLIST

#1 _____

Mail Date _____

Mailed _____

[] self-mailer
[] envelopes
  [] #10
  [] air
  [] 6 x 9
  [] special

[] Labels
  [] cheshire
  [] adhesive

Mailing Class
  [] First
  [] Third
  [] Air

Include:

_____
_____
_____
_____

#2 _____

Mail Date _____

Mailed _____

[] self-mailer
[] envelopes
  [] #10
  [] air
  [] 6 x 9
  [] special

[] Labels
  [] cheshire
  [] adhesive

Mailing Class
  [] First
  [] Third
  [] Air

Include:

_____
_____
_____
_____

#3 _____

Mail Date _____

Mailed _____

[] self-mailer
[] envelopes
  [] #10
  [] air
  [] 6 x 9
  [] special

[] Labels
  [] cheshire
  [] adhesive

Mailing Class
  [] First
  [] Third
  [] Air

Include:

_____
_____
_____
_____

OTHER MAILINGS/SPECIAL DISTRIBUTION

Quantity/Item	To Whom:
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

SPECIAL NOTES REGARDING MAILINGS:

A minimum of 200* identical pieces going within the continental U.S. are required for a THIRD class mailing.

Pieces going to Canada must be sealed on all four sides (i.e. the best way is in envelopes); those to Alaska and Hawaii should go first class; foreign have to go air mail (foreign) in air mail envelopes. Bulk quantities of brochures may NOT have 3rd class permit imprinted. Indicate quantity separation below if brochures will have 3rd class permit imprinted:

QUANTITY SEPARATION:	# with permit	# without permit
Piece # ____	_____	_____
Piece # ____	_____	_____
Piece # ____	_____	_____

(to include those for foreign & bulk mailings & those for office use, files, etc.)

*Minimum charge (as of) for Third Class sort is $ so check cost effectiveness on small mailings. Labeling is additional $ minimum.

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7. The "GENERAL INFORMATION SECTION" (two pages) is a place to put information that will need to go into your brochure or marketing mail out. This should be as comprehensive as possible. The information is intended to tell the potential attendee **everything** he/she needs to know in order to attend the program. Once the program planner fills in the information, the secretary or editor can take it and put it in the proper form for the brochure.

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GENERAL INFORMATION SECTION

Location of conference sessions (building(s), streets, city):

_____

_____

_____

_____

Registration Cut-Off Date: _____

Registration Desk Location & Hours:

Facility/Room	Date	Hours

Registration Fees & What They Include:

Fee	Type	Includes

Meals:

Type	Fee	Date	Time	Type	Fee	Date	Time

Other (cafeteria, etc.):

_____

_____

_____

Housing: Facility Name/Address/Phone

_____ _____
_____ _____
_____ _____

Phone ( ) _____ Phone ( ) _____

Rates: S_____ D_____ D/T_____ Rates: S_____ D_____ D/T_____

Cut-off date _____ Cut-off date _____

_____ _____
_____ _____
_____ _____

Phone ( ) _____ Phone ( ) _____

Rates: S_____ D_____ D/T_____ Rates: S_____ D_____ D/T_____

Cut-off date _____ Cut-off date _____

Manner in which reservations to be made: (e.g. Contact facility directly, via Bureau, use of housing cards, etc.)

_____

Refunds/Cancellations (include cut-off date):

_____

Parking:

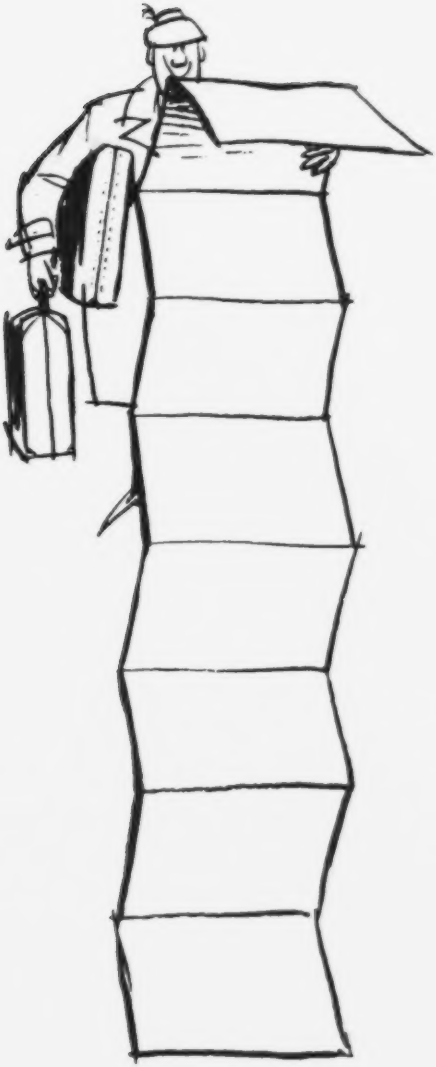
_____
_____

Transportation:

_____
_____

All other items to be included in General Information (include a draft of the statements)(e.g. CEU's Statement, Exhibits, Recreational Opportunities, Workshop Selection/Preference, etc.):

_____
_____
_____
_____
_____
_____



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8. The "SPECIAL ARRANGEMENTS LIST" contains the information needed about who is to receive "special arrangements." From this list a letter is prepared identifying for each person what he/she is to receive --from a "comp" registration, to a stipend, travel expense reimbursement, free conference meals, etc. There is room to indicate if an A-V request form (item 9) has been sent. Under "other," you may wish to request a Vita for introductory use, or other items. If you do not know the person's Social Security number, a reply post card can be sent with the "special arrangements" letter, asking for a quick reply. Better yet, include a postage paid reply envelope -- to send back the Social Security number card and the A-V request form.

NAME & ADDRESS	Comp. Regis.	STIPEND	APPOINTMENT	TRAVEL REIMBURSEMENT	Conf. Meals (Date)	A-V Form	Other
		Amount $	(yes) (no)	Trans Lodg Meals			
		Date & Nature of Service:	Title & Dept.				
phone		SS# ___-___-___					

NAME & ADDRESS	Comp. Regis.	STIPEND	APPOINTMENT	TRAVEL REIMBURSEMENT	Conf. Meals (Date)	A-V Form	Other
		Amount $	(yes) (no)	Trans Lodg Meals			
		Date & Nature of Service:	Title & Dept.				
phone		SS# ___-___-___					

NAME & ADDRESS	Comp. Regis.	STIPEND	APPOINTMENT	TRAVEL REIMBURSEMENT	Conf. Meals (Date)	A-V Form	Other
		Amount $	(yes) (no)	Trans Lodg Meals			
		Date & Nature of Service:	Title & Dept.				
phone		SS# ___-___-___					

NAME & ADDRESS	Comp. Regis.	STIPEND	APPOINTMENT	TRAVEL REIMBURSEMENT	Conf. Meals (Date)	A-V Form	Other
		Amount $	(yes) (no)	Trans Lodg Meals			
		Date & Nature of Service:	Title & Dept.				
phone		SS# ___-___-___					

NAME & ADDRESS	Comp. Regis.	STIPEND	APPOINTMENT	TRAVEL REIMBURSEMENT	Conf. Meals (Date)	A-V Form	Other
		Amount $	(yes) (no)	Trans Lodg Meals			
		Date & Nature of Service:	Title & Dept.				
phone		SS# ___-___-___					

9. The "AUDIO-VISUAL EQUIPMENT REQUEST" form is extremely important. This enables you to know what equipment you must order (and pay for) for the various speakers and presenters. It needs to be sent early -- so the cost of equipment rental in the budget can be based on these requests instead of "guesses."

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AUDIO VISUAL EQUIPMENT REQUEST

Please check the item(s) which you will need for the conference indicated below. This form should be returned even if equipment is not required.

CONFERENCE:

DATE:

AUDIO-VISUAL EQUIPMENT

[] 16MM Movie Projector
[] 8MM Movie Projector
[] Super 8MM
  [] with sound [] without sound
[] 35MM (2x2) Slide Projector
  [] Carousel [] Standard
[] Overhead Projector (for transparencies no larger than 10"x10")
[] Audio Tape Reel-to-Reel Player
  [] 1 7/8 IPS [] 3 3/4 IPS
  [] 7 1/2 IPS [] 15 IPS
  [] Quarter Track Stereo
  [] 2 Track Stereo
  [] Full Track Mono
[] Audio Tape Cassette Player
  [] Mono [] Stereo
[] Video Tape Player
  [] Cassette [] Reel-to-Reel
  With ____ Monitors, Size _____
  [] Color [] Black/White

EQUIPMENT OPERATOR

[] Date(s) _____ Time(s) _____
_____ _____
_____ _____

[] For Set-up Only

MIKES

[] Table [] Floor [] Lapel

MISCELLANEOUS EQUIPMENT

[] Bulletin Board
[] Chalkboard
[] Easel
[] Lectern
[] Newsprint/Flipchart
[] Pointer
[] Table(s) ____ for display
[] Table(s) ____ & Chair(s) ____ for panel

[] OTHER EQUIPMENT _____

Signature _____
Mailing Address _____
_____
Telephone (___) _____

PLEASE RETURN NO LATER THAN _____ TO:

10. The "ESTIMATED BUDGET" form is your "map" to program expenditures. It should list clearly all the estimated expenses you foresee in the program -- quantifying in dollars what you envision happening in the various phases of the conference. Your fee becomes part of the total expense. This total expense figure can be divided by a "conservative estimate" of the attendance and, thus, establish what is needed as a Registration Fee. This is a fairly common form. And I find it is the only way to answer the most often asked question: "How much does it cost to put on a conference?"

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Account Number _____

CONFERENCE ESTIMATED BUDGET

Date:

CONFERENCE TITLE AND DATE _____

INCOME

Registration fees ..... _____ @ $_____ $_____
Meal income ..... _____
Other ..... _____

TOTAL INCOME $_____

EXPENSE

Food service
Breakfasts ..... $_____
Luncheons ..... _____
Dinners ..... _____
Coffee hours ..... _____
Planning committee ..... _____
Total food service $_____

Travel _____

Program expense
Stipends ..... $_____
Clerical (hourly) ..... _____
Printing ..... _____
Multilithing ..... _____
Addressing service ..... _____
Postage ..... _____
Telephone ..... _____
Audio-visual .....
Projection ..... _____
PA system ..... _____
Recording ..... _____
Delivery service ..... _____
Buses ..... _____
Signs ..... _____
Badges ..... _____
Supplies and materials ..... _____
Room rental ..... _____
_____
_____
_____
Total program expense _____

Total conference costs _____

Administrative expense _____

TOTAL EXPENSE $_____

Surplus $_____

Deficit $_____

_____
Signature of Organization Representative Date

_____
Representative Date

11. The "CHARGE SLIP" is another place to "write it down." This sheet is for all the "miscellaneous" charges you can forget so easily, but need to charge to the program. We used to have a 3 x 5 card for this purpose. Now look at it! I'll bet you can even add some items. However you make one up, it's a handy "catch-all" for items you need to remember, and collect for.

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CHARGE SLIP

CONFERENCE _____ DATE _____

Account Number _____

Coordinator Approval _____ Date _____

The following items will be charged back to the account number above at the conclusion of the conference.

Certificates
_____ @ $.15 = _____

Directional Signs
_____ @ $.30 = _____

Envelopes (If not Special Order)
_____ @ $.015 = _____

Extension Folders
_____ @ $.20 = _____

Manila Envelopes
_____ @ $.03 (small) = _____
_____ @ $.04 (medium) = _____
_____ @ $.05 (large) = _____

Maps
_____ @ $.01 = _____

Meal Tickets (minimum $5.00)
_____ @ $.01 = _____

Name Badges and Plastics (sets)
_____ @ $.10 = _____

Name Tents
_____ @ $.20 = _____

Newsprint Pads (various sizes)
_____ @ $ = _____

Pencils, Pens, Magic Markers, etc.
_____ @ $ = _____

Place Cards
_____ @ $.10 = _____

Ribbons
_____ @ $.20 = _____

Transparencies
_____ @ $.23 = _____

Walking Tour Guides
_____ @ $.05 = _____

Writing Paper Pads (various sizes)
_____ @ $.16 (small) = _____
_____ @ $.35 (med.) = _____
_____ @ $.41 (lg.) = _____

Xeroxing
_____ @ $.05 = _____

Addressing
Typing
Matrix _____ @ $1/sheet = _____
Envelopes _____ hrs. @ $4.25 = _____

Materials
Labels _____ @ $.10/sheet = _____

Affixing Labels (minimum $10.00)
_____ @ $12/1000 = _____

Certificate Preparation
_____ @ $.05 = _____

Envelope Stuffing (minimum $10.00 - when not direct charge)
_____ pieces @ $15/1000 = _____

Equipment Rental
Easel _____ days @ $6/day = _____
P.A. _____ days @ $8/day = _____

Notebook/Folder Preparation
_____ hrs. @ $4.25 = _____

Special Typing
_____ hrs. @ $4.25 = _____

Other:
_____ @ _____ = _____
_____ @ _____ = _____
_____ @ _____ = _____
_____ @ _____ = _____
_____ @ _____ = _____

Messenger
Tote Pick-up/Delivery $15.00
AV Pick-up/Delivery $5.00
Date: _____ Charge _____
_____ _____
_____ _____
_____ _____
_____ _____

12. The "ON-SITE STAFF NEEDS" sheet helps you indicate for the person who schedules registration clerks just what staff needs you will have on-site. If you travel out of town with the staff, it helps "firm up" who gets the car and who drives -- and who picks up whom! A lodging checklist is also part of the sheet. This all helps!

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ON-SITE STAFF NEEDS

Program Title _____ Date _____

Registration Staff: Consider set-up time, luncheon/banquet ticket pick-up time, travel time, breakdown time, etc.

Date _____
Location _____
Times _____
Staff Needed []1 []3 []5 []7
[]2 []4 []6 []8

Date _____
Location _____
Times _____
Staff Needed []1 []3 []5 []7
[]2 []4 []6 []8

Date _____
Location _____
Times _____
Staff Needed []1 []3 []5 []7
[]2 []4 []6 []8

Date _____
Location _____
Times _____
Staff Needed []1 []3 []5 []7
[]2 []4 []6 []8

Date _____
Location _____
Times _____
Staff Needed []1 []3 []5 []7
[]2 []4 []6 []8

Date _____
Location _____
Times _____
Staff Needed []1 []3 []5 []7
[]2 []4 []6 []8

Transportation Arrangements:

[] Transportation Requisition #_____, Driver _____

[] Personal Auto, Driver _____

[] Coordinator to drive staff.

Leaving _____ From where _____

Returning _____

Lodging Arrangements:

Will staff be staying overnight? []Yes []No ____ #/Singles ____#/Doubles

Arrival _____ Departure _____

Payment: [] Purchase Order # _____
[] Travel Advance (consider amount(s) needed)
[] Staff to pay-reimbursement on Travel Voucher

Complete name and address of facility _____

_____

_____

Phone (___) _____

13. The "REGISTRATION TALLY" sheet looks complicated -- but it isn't. It really has a lot of space for several categories of registrations -- by fees collected. The example shown has three categories; Members, Non-members, Students. Each has a separate fee which may be handled in one of four ways: Paid, Comp, COD, or Billing. The Canc. column is in case of a cancellation. The posting of registrations is carried out daily -- or by date stamp on the registration cards. This way you can "lag" a few days, and still be accurate. The "tot" is a running total, day by day, so the bottom figure is always the "cumulative" total -- added across giving the complete total-to-date. It's a good form that works well. Try it -- you may like it better than what you're now using!

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CONFERENCE:

Date	Registration	MEMBERS @ $100.00				NON-MEMBERS @ $125.00					STUDENTS @ $50.00				
	PAID	COMP	COD	BILL	CANC	PAID	COMP	COD	BILL	CANC	PAID	COMP	COD	BILL	CANC
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															
tot															

14. The "TOTE BOX CHECK LIST" helps you be sure you have everything you need. The coordinator checks the first column "To Go," and initials the sheet. The secretary who packs the box checks "Sent" when the item goes in the box. After the conference, the secretary checks "Ret'd." as the box is unpacked. The final column "Put Away" should be self-explanatory! This sheet not only helps insure everything going to the program site that needs to go -- but helps cut down "lost" items afterward. Lost conference equipment and supplies can cost lots of dollars. This helps cut your "losses."

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TOTE BOX CHECK LIST

Program Title _____ Date _____

Registration Location _____

To Go	Sent	Ret'd.	Put Away	
				Advance Registration Box
				Acknowledgements
				Meal Tickets
				Registration Cards
				Extra Reg. Boxes 1 - 2 - 3
				Badges (regular/stick-on)
				Plastics
				Blankets
				Cash Boxes 1 - 2 - 3
				Change Fund (breakdown)
				Conference Supply Box 1 - 2 - 3
				Extra Supplies
				Handout Materials
				Folders: type
				Maps: type/#
				Notebooks
				Programs
				Ribbions: type/#
				Phone
				Signs (Advance/New/Name of Conference)
				Sign Standards 1 - 2 - 3
				Blank Signs # Other:
				Tent Cards
				Travel Vouchers
				Typewriter (Electric/Manual/Rental) 1 - 2 - 3
				Other Items:
				A-V Equipment
				Coordinator's Conference File (regular/notebook)
				Tote to be sent on by
				Tote to be stored

_____ Coordinators Initials

15. The "COORDINATOR'S COMMENT AND EVALUATION SHEET" comes at the least desirable moment -- at the end of the program! But that's when it needs to be filled in. That's when it's still fresh in mind. Tell it like it happened! Here's your chance to call a spade "a spade." This sheet is especially helpful if the program is held again next year. It can be referred to and used as a guide to overcome what "could have been improved." It's for your own use -- and your boss. So be honest!

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COORDINATOR'S COMMENT AND EVALUATION SHEET

Name of Conference _____

Date _____ Location _____

Coordinator _____ Attendance _____

1. What were the conference objectives? Were they met? Why?

2. What means (are being/have been) employed for evaluating the program? Will the planning committee meet and review the evaluations?

3. General Comments: (facilities, food service, registration, chairman, conferees, subject covered, attendance, mailing, planning, etc.)

4. What could be done to improve this conference were it to be held again?

5. Did anything unusual happen?

16. The "EVALUATION QUESTIONAIRE" (two pages) is sent to the program chairperson after the program, usually with a cover letter from the Conference Department Director. It asks the chairperson's help in evaluating various aspects of the program -- and the Conference Department's service. Here's where you get your "thorns" or "roses!" But it's very valuable input. The constructive criticism can be used to improve your service. The compliments can be used as "testimonials" in your next Department "marketing" promo! It works -- and it helps make you and your programs better!

QUESTIONNAIRE

CONFERENCE _____

DATE _____

Please respond to each question by placing a check at the appropriate term. Your comments are encouraged.

1. Do you feel the conference coordinator administered all aspects of the conference in a courteous, efficient, and professional manner?

All of the time	Most of the time	Some of the time	Seldom	Never

Comments:

2. Were the registration procedures and other support functions conducted in an efficient and courteous manner?

All of the time	Most of the time	Some of the time	Seldom	Never

Comments:

3. Do you feel that the physical facilities, including housing for the conferees, were satisfactory?

All of the time	Most of the time	Some of the time	Seldom	Never

Comments:

4. Did you request any services that could not be provided by the Conference Department? ____ Yes ____ No. If yes, please state:

5. As a result of this conference, were other needs or areas of research identified that could be developed into a topic for a future conference? ____ Yes ____ No. Please elaborate.

6. Considering everything, indicate the manner in which the Department of Conferences and Institutes conducted your conference activities.

Excellent	Very Good	Satisfactory	Poor	Very Poor

Additional comments will be appreciated:

Signature _____

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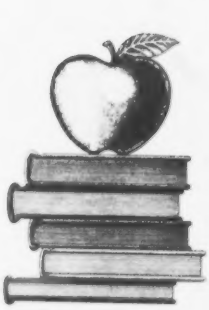
Selected Bibliography On Conference Planning & Administration



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GUS MUELLER is a conference planner and administrator with award winning ideas and experience.

For sixteen years, Gus worked as a leader in programming for both adults and youth in Michigan and Indiana.

In 1968, he joined the staff of The University of Michigan as a Program Coordinator. Since then he has planned and coordinated over 400 conference programs--with a wide variety of formats--from a three-state traveling seminar for historical site interpreters, to a joint national conference for two associations whose 1700 members met in the "world class" Detroit Plaza Hotel.

While carrying out this busy schedule, Gus also completed the Ph.D. in Adult and Continuing Education (from The University of Michigan) and won three National University Continuing Education Association awards. He is now Director of Conferences & Institutes for The University of Michigan.*

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* On April 1, 1983, Gus became Director of the Division of Professional Development, School of Continuing Studies, Indiana University, Bloomington, Indiana.